

### **INTERVIEW SUMMARY**

Applicants thank Examiner Boswell for her participation in a series of interviews, during which the wording of a new claim 101 was worked out.

The interviews began with an in person interview on July 16, 2009. The in person interview followed an agenda, of record, proposed on June 23 with a prior office action response. During the interview, we discussed whether minor changes to the new claim 100 would put it in condition for allowance. For instance, we discussed identifying users as planning users and more explicitly tying together the forecasting and generating steps. As a general approach, we discussed a new claim that would include creating hierarchies of stores and goods, creating a causal calendar, presenting a user interface that refers to nodes in the hierarchies, receiving user entry of data, forecasting and analytical reporting. It appeared that the distinction between promotional and non-promotional events could be eliminated from the new claim. The Examiner made reference to Adhikari, US 7,222,082, but there was relatively little discussion of the reference, as it was cumulative and primarily directed to planning of staffing for production. We agreed to talk further on Monday, July 20.

Several telephonic interviews followed, of varying lengths. Our notes indicate telephone conferences on at least July 17, 20 and 22 and on August 24 and several additional scheduling telephone calls. We spoke briefly on July 17, and learned a little more about wording that the Examiner would consider desirable. In preparation for the July 20 interview, we submitted the attached e-mail and draft claim.

Our substantive interview proceeded on July 22. During the interview, we tinkered with the wording of a new claim, leading to the new claim labelled "JULY 22 VERSION".

On August 5, we received a proposed new claim by fax from Examiner Boswell, to which we responded on August 6 by fax.

On August 24, we discussed our fax submissions and agreed to submit a new claim 101 substantially as presented above. We agreed to proceed by supplemental amendment, to allow Applicants to make appropriate amendments to dependent claims. We understood from the interview that the new claim would distinguish over the art of record.